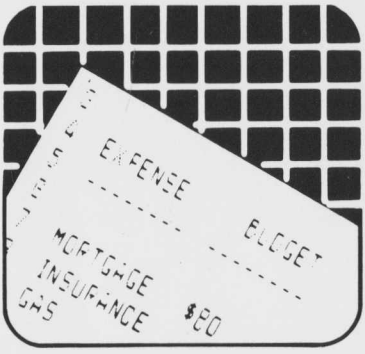
SynCalc™

Templates Disk



Requires Atari 400/800/XL/XE or Commodore 64 with minimum 48K RAM, disk drive and SynCalc program disk. Optional: printer, increased memory.

synapse

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SYNCALC TEMPLATE

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1 GENERAL INTRODUCTION

TEMPLATE is an easy-to-use electronic template assortment designed for use with the *SYNCALC* electronic speadsheet program. *TEMPLATE* has many uses in both home and office, providing the format and formulas required for many commonly used worksheets. These worksheets can easily be expanded or modified to match the unique requirements of your home and business use. The *TEMPLATE* disk contains such business applications worksheets as multiple financial and investment portfolio analyses, inventory models, capital asset pricing model, expense reports, linear regression analysis, and a personal appointment calendar. In the home, *TEMPLATE* can be put to use with a checking account register and budget analysis, metric and kitchen conversion tables, personal property inventory, cost analysis of renting vs. buying a home, and a statement of net worth (required for real estate loan applications).

TEMPLATE, by providing formulas and predesigned formats, can save you hours of time in designing and implementing the sometimes complicated calculations used in planning and forecasting worksheets. *TEMPLATE* also provides basic design principles for use in constructing or modifying your own spreadsheets, from the simple to the complex.

How to Use This Manual

This manual is designed to be used in conjunction with the *SYNCALC* program manual. The *TEMPLATE* manual provides the basic instructions required for use of the templates; detailed instructions for use of the *SYNCALC* program will be found in the program manual.

The *TEMPLATE* manual has been divided into three sections.

The first section covers the equipment necessary to run *SYNCALC* and *TEMPLATE*, two important notes on getting started, and a list of the *TEMPLATE* file names with a short description of each file.

The second section includes general instructions for use with all of the templates. This section explains the process for loading and saving worksheets constructed with the templates as well as instructions for modification of the worksheets.

The third section is devoted to explaining the specifics of each template, and covers each template in detail.

What You Will Need

1. An ATARI or COMMODORE 64 home computer with a minimum of 48K RAM.
2. At least one disk drive (a maximum of two drives is

supported).
3. The *SYNCALC* program diskette and manual.
4. The *TEMPLATE* diskette and manual.
5. A TV set or other video monitor. A black and white set will work.
6. Blank diskettes for storing your data.

Optional:

1. A printer compatible with your computer for obtaining hard copy versions of your work.
2. Additional memory to increase your computer's capacity.

Getting Started (Two Important Notes)

Using one of the *TEMPLATE* worksheets with *SYNCALC* is easy, but there are two important points to remember. Some of the worksheets involve complex calculations that can slow down the data entry process. In these worksheets, the automatic calculation function has been turned off to speed up data entry. Before making a decison based on figures in a worksheet or doing a final save on a worksheet, press START a few times. This will ensure that all of your figures have been updated.

Some of the worksheets in the *TEMPLATE* package are quite wide, and will not fit on standard 8½ inch paper. If your printer will not accept wider paper, you will need to use a condensed font or print out the worksheet in sections. The *SYNCALC* manual includes a section on how to make several popular printers print *SYNCALC* worksheets in condensed fonts.

TEMPLATE File Names

FILE NAME	FUNCTION
Bonds	Bond portfolio evaluation of up to 12 issues.
Calendar	Weekly personal appointment calendar.
Capm	Rate of return using capital asset pricing model.
Capm2	Portfolio valuation using capital asset pricing model.
Checking	Checking account register with account analysis.
Check2	Checking account register without account analysis.
Expense	Generates expense reports.
Invent1	Economic order quantity with no backorders.
Invent2	Economic order quantity with backorders.
Invent3	Economic order quantity with a fixed production rate.

Kitchen	Kitchen measurement conversion table.
Linreg	Simple linear regression using least squares.
Metric	Metric measurement conversion table.
Mortgage	Analysis of mortgage using the rule of 78.
Networth	Statement of net worth like that used on real estate loan applications.
Painting	Calculates the amount of each color paint required to paint a room. Also cost analysis.
Property	Personal property inventory and valuation.
Queue1	Single server waiting line (queue) model.
Queue2	Two server waiting line (queue) model.
Ratios	Key financial ratio analysis of income statement and balance sheets.

RentBuy	Analysis of the cost of renting vs. purchasing a home.
Stocks	Stock portfolio evaluation.

2 GENERAL INSTRUCTIONS

Loading the Program

TEMPLATE must be used with the *SYNCALC* spreadsheet program. The first step in using *TEMPLATE* is to load *SYNCALC* into your computer using drive 1. If you have any problems loading *SYNCALC*, see the *SYNCALC* manual. Once *SYNCALC* has been loaded into memory, you can remove the disk from the drive.

Now that *SYNCALC* has been loaded and drive 1 is free, put the *TEMPLATE* disk in drive 1. The *TEMPLATE* disk has been write protected, so you will also need a blank formatted disk if you wish to save your worksheets. If you have two drives, put the blank data disk in drive 2. If you have one drive, you will need to swap the *TEMPLATE* disk for your data disk before you save your worksheet.

Loading a Template

Press OPTION to view the main menu. Use the cursor controls to select LOAD/SAVE. Press RETURN. Select LOAD and press RETURN.

Now the computer will ask whether you would like

to load a worksheet (wrksheet) or data. Select WRKSHEET and press RETURN. If this is the first time you are using a template, the target cell should be A1. Pressing RETURN in response to the target cell query will cause the target cell to default to A1.

The *TEMPLATE* disk should be in drive 1, so select drive 1 as the drive from which to load. If you put the *TEMPLATE* disk in drive 2, select drive 2. After a moment, the screen will display a menu listing the file names of all the templates stored on the disk.

The computer will now ask for the file name of the 'worksheet' you wish to load. Enter the file name of the template you will be using. There are two ways to enter the file name, by typing it out or by using cursor controls to select the file name from the menu at the top of the screen. You can find a list of the *TEMPLATE* file names with a short description of each file at the end of the first section of this manual. Press RETURN to begin the load.

Your screen will display the upper left-hand corner of the *SYNCALC* worksheet with the *TEMPLATE* headings and formulas in place, ready for you to input data. For instructions on entering data for a specific worksheet, turn to the next section.

Saving a Worksheet

Worksheets created with *TEMPLATE* are saved in the same manner as all other worksheets used with *SYNCALC*. Press OPTION to get the main menu and

select LOAD/SAVE. Select SAVE and then choose whether to save the worksheet, data, or text (see *SYNCALC* manual). Select the drive number of your data disk. Enter the file name of your worksheet, making sure that you do not have another file with the same name on that data disk. Remember to push START a few times before you do a final save on a worksheet. Many of the *TEMPLATE* worksheets are so large that the automatic calculation function has been turned off to speed up the data entry process. Pressing START ensures that all sections of the worksheet have been updated with the most recent calculations.

NOTE: The *SYNCALC TEMPLATE* disk has been write protected to prevent you from accidentally saving your worksheet over a template. Use a new data disk to store your modified worksheets.

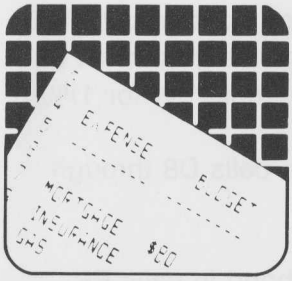
Printing a Worksheet

To print a worksheet, first call up the main menu with the OPTION key. Select the COMMAND option, then the PRINT option. Select either WORKSHEET or CONTENTS. Give the range of cells you would like printed. Remember that many worksheets are too wide for 8½ inch paper. You will have to use a condensed type font or print the worksheet in sections if your printer cannot accept paper wider than 8½ inches.

Modifying a Worksheet

The worksheets supplied with *TEMPLATE* can be

modified to match the needs of your home or office. If you need to add space for additional entries, add a few rows and copy the formulas to the new rows. If you need additional categories, add columns and copy the formulas to the new columns. Detailed instructions on copying formulas can be found in the *SYNCALC* manual.



3 SPECIFIC INSTRUCTIONS

The following pages contain detailed instructions for each of the *SYNCALC TEMPLATES.* The instructions are in alphabetical order by the template file name. If you wish to look up instructions for a specific template, you can turn to the Table of Contents to find the page number.

File name: Bonds

Description: Bond portfolio evaluation of up to 12 issues. Calculates total value and yield to maturity for portfolio of bond investments.

How to use it:

1. Enter the names of the companies in cells A8 through A19.

2. Enter the bond ratings in cells B8 through B19. Entering the ratings is optional and is merely intended to give you a place to record the risk factor of each bond.

3. Enter the interest rate for each bond in cells C8 through C19. Note that the interest rate must be a value between 0 and 1 (i.e., enter .11 for 11%).

4. Enter the years to maturity in cells D8 through D19.

5. Enter the par value of each bond in cells E8 through E19.

6. Enter the number of each type of bond you own in cells F8 through F19.

7. The investment value (par value x number held) will appear in column G.

8. Enter the commission paid for the purchase of the bonds in cells H8 through H19.

9. Enter the total purchase price for the bonds in cells I8 through I19.

10. The total cost (commissions + purchase price) will appear in column J.

11. Enter the current price per bond in cells K8 through K19.

12. The current value (number held x current price) will appear in column L.

13. The annual interest income will appear in column M.

14. The yield to maturity will appear in column N.

15. The appropriate totals for your bond portfolio will appear in row 21.

File name: Calendar

Description: Weekly personal appointment calendar. The columnar orientation of spreadsheet programs provides an ideal format for tables of data like dates and times. Although spreadsheets are typically used for calculating, their structure suggests many other applications as well.

How to use it:

1. The time in half-hour increments appears in column A. Columns B to H allow you to enter your appointments for each day of the week.

2. You can replace the (MM/DD/YY) in row 5 with the actual date for each day.

File name: Capm

Description: Rate of return calculation using the Capital Asset Pricing Model. Underlying this model is the assumption that there is a risk/return tradeoff. The Capital Asset Pricing Model asserts

that the rate of return on an investment is a linear function of the risk-free rate (Rf) and the Market Rate of Return for similar assets (Rm). Using the stock market as an example, the risk-free rate could be assumed as the rate currently paid on T-Bills. The market rate of return can be estimated using one of the market indices like the S&P 500 or Wilshire 5000 (the Dow Jones index is NOT a good indicator of overall market activity). Beta is the term used to express the relationship between the performance of the stock relative to the market. Specifically, it is the historical covariance of the stock relative to the market. Betas are available from a variety of printed and electronic sources, including Valueline. Additional information can be found in books on modern portfolio analysis and management.

How to use it:

1. Enter the Risk-Free Rate in cell D8.

2. Enter the Market Rate of Return in cell D10.

3. Enter the Beta for the asset in cell D12.

4. The expected Rate of Return will appear in cell D15.

File name: Capm 2

Description: Portfolio valuation using the Capital Asset Pricing Model (see notes on Capm for an explanation of the Capital Asset Pricing Model).

How to use it:

1. Enter the Risk-Free Rate in cell C4.

2. Enter the Market Rate of Return in cell C6.

3. In rows 12 to 21, enter the following information for each stock:

   The stock name and symbol in columns A and B.

   The number of shares held in column C.

   The current market price in column D.

   The Beta for each stock in column G.

4. The total value for each security will appear in column E.

5. The percent of the total portfolio that each stock represents will appear in column F.

6. The expected rate of return for each stock will appear in column H.

7. Row 24 shows the totals for the entire portfolio. The portfolio Beta and expected returns are weighted averages.

File name: Checking

Description: Checking account register with account analysis for up to 30 checks per month.

How to use it:

1. Enter your starting balance as a deposit in the first row.

2. Enter the check number in column A.

3. Enter the date of the check in column B. The date should be entered in text mode.

4. Enter the payee of the check in column C.

5. Enter the account number to which you would like to categorize the expense in column D. The account numbers are initially set up as:

    10 = House and utilities
    20 = Food
    30 = Clothing
    40 = Medical and dental
    50 = Entertainment
    60 = Charge accounts
    70 = Cash
    80 = Misc.

6. Enter the amount of the check/deposit in columns E/F respectively.

7. The running balance in your account will appear in column G.

8. The account analysis will appear in the cell range I1 through P45.

9. Totals for the month will appear in row 41.

10. Enter the figures for the last month's year-to-date in row 43.

11. The new year-to-date totals will appear in row 45. You can use the SAVE DATA command to save row to disk to be loaded into row 43 for the next month.

    40 = Medical and dental
    50 = Entertainment
    60 = Charge accounts
    70 = Cash
    80 = Misc.

File name: Check 2

Description: Checking account register without account analysis.

How to use it:

1. This worksheet is identical to Checking except

that the account analysis has been removed to speed the calculation process. See the instructions for Checking.

File name: Expense

Description: This form is similar to the expense settlement/reimbursement form used by many businesses for travel, entertainment, and other expenses.

How to use it:

1. Enter your name in cell B3.
2. Enter your department in cell D3.
3. Enter the date you are submitting this report in cell I3.
4. Enter the purpose of your travel in cell B4.
5. Enter the dates of your travel in G4 and I4.
6. Replace the (MM/DD/YY) in cells C9 to I9 with the actual dates of your travel.
7. For each day of the week, enter your expenses in the rows corresponding to the type of expense incurred. Daily and category totals will be automatically calculated.

8. Enter the amount of advance you received in cell J27. The amount due you (or to be paid back to the company) will appear in cell J29.

9. The sections in rows 36 to 100 provide spaces to record detailed information about transportation and entertainment expenses.

10. Lines are provided for the necessary approval signatures.

File name: Invent 1

Description: Economic Order Quantity (EOQ) with no backorders. This model determines the best quantity to order (EOQ), given the fixed order costs (K), annual demand (A), unit cost (C), and holding cost/year (H).

How to use it:

1. Enter the fixed order cost (costs of placing an order no matter how large or small it might be) in cell B6.

2. Enter the annual demand (total units/year) in cell B7.

3. Enter the unit cost in cell B8.

4. Enter the holding cost per unit per year in cell B9.

5. The EOQ will appear in cell B14.

6. The order interval (in years) will appear in cell B16.

7. The total cost of the order will appear in cell B18.

File name: Invent 2

Description: Economic Order Quantity (EOQ) with backorders. This model calculates the EOQ, allowing for backorder conditions.

How to use it:

1. Enter the fixed order cost (the cost of ordering no matter how small or large the order) in cell B6.

2. Enter the annual demand in units in cell B7.

3. Enter the unit cost in cell B8.

4. Enter the holding cost per unit per year in cell B9.

5. Enter the shortage cost (the opportunity cost of being out of an item) in cell B10.

6. The optimal order quantity will appear in cell B15.

7. The optimal time between orders (in years) will appear in cell B17.

8. The average on-hand inventory will appear in cell B19.

9. The total cost of the order will appear in cell B21.

File name: Invent 3

Description: Economic Order Quantity (EOQ) with fixed production rate. This model calculates the EOQ, assuming a fixed production rate.

How to use it:

1. Enter the fixed order cost (the cost of ordering no matter how small or large the order) in cell B6.

2. Enter the annual demand in units in cell B7.

3. Enter the unit cost in cell B8.

4. Enter the holding cost per unit per year in cell B9.

5. Enter the production rate in units per year in cell B10.

6. The optimal order quantity will appear in cell B15.

7. The optimal time between orders (in years) will appear in cell B17.

8. The total cost of the order will appear in cell B21.

File name: Kitchen

Description: Kitchen conversion table. Converts common kitchen measurements between metric and English standards.

How to use it:

1. Locate the unit measure you wish to convert in column B.

2. Enter the quantity to be converted in column A.

3. The corresponding amount in teaspoons, tablespoons, fluid ounces, cups, pints, quarts, milliliters, and liters will appear in columns D through K.

File name: Linreg

Description: Simple linear regression using least squares; includes forecasting function.

How to use it:

1. Enter the X and Y values for each observation in columns A and B respectively. The worksheet

is initially set up for as many as 12 observations in rows 6 to 17. This can easily be expanded for larger data sets by inserting rows.

2. The necessary intermediate figures are calculated in columns C to E.

3. The average X and Y values appear in row 21.

4. The number of observations appears in cell B25.

5. The slope of the best fit line appears in cell B28.

6. The intercept of the best fit line appears in cell B30.

7. The correlation coefficient of X and Y appears in cell B33.

8. You can forecast a value for Y by entering a value for X in cell B40. The forecast Y will appear in cell B42.

File name: Metric

Description: Metric conversion table. Converts between the metric and English systems of measurement.

How to use it:

1. Simply locate the row corresponding to the

desired conversion and enter the amount to convert in column A.

2. The converted amount will appear in column D.

File name: Mortgage

Description: Analysis of mortgage costs using rule of 78. Determines the amount of interest and amount of principal paid each month.

How to use it:

1. Enter the amount of the loan in cell C4.
2. Enter the annual interest rate (between 0 and 1) in cell C5.
3. Enter the term of the loan in years in cell C6.
4. Enter the year you wish to display in cell C7.
5. The figures in cell range A10 to C14 are simply temporary figures.
6. The balance, interest amount, and principal amounts for each of the twelve months will appear in columns B, C, and D, respectively, of rows 21 to 32.
7. The totals are shown in row 34.

File name: Networth

Description: Statement of net worth like that used in real estate loan applications.

How to use it:

1. Enter the amount of deposit towards the purchase in cell C11. You can also enter who is holding the deposit in cell A11.

2. List all savings and checking accounts with descriptions in cells A15 through A20 and balances in cells C15 through C20.

3. List all stock and bond investments with descriptions in cells A24 through A31 and values in cells C24 through C31.

4. Enter the value of any life insurance at net cash value in cell C35.

5. The subtotal of liquid assets will appear in cell C38.

6. The value of real estate owned will appear in cell C43 after the real estate schedule is filled out (we'll do this later).

7. Enter your vested interest in a retirement fund in cell C46.

8. Enter the net worth of any business owned in cell C50.

9. List any automobiles owned and their current value in the cell range A53 to C55.

10. Enter the value of your furniture and personal property in cell C57.

11. Itemize any other assets in the cell range A60 to C62.

12. The total asset value will appear in cell C65.

13. List all installment debts like charge cards, etc. in the cell range E10 to I20, with the monthly payment amount in column H and the unpaid balance in column I.

14. List all other debts in the cell range E23 to I31.

15. List all real estate loans in the cell range E33 to I43.

16. List all automobile loans in the cell range E34 to I43.

17. Itemize any alimony, child support, or separate maintenance owed in the cell range E54 to I59.

18. The total monthly payments will appear in cell H61.

19. The total liabilities will appear in cell I65.

20. The total net worth (total assets - total liabilities) will appear in cell I68.

21. You must still fill in the real estate schedule. List all property in rows 78 to 81. You can enter a type (residential, income, etc.) in column C.

22. Enter the present market value of each property in column D.

23. Enter the amount of mortgages and liens owed in column E.

24. Enter the gross monthly rental income, if any, in column F.

25. Enter the monthly mortgage payment in column G.

26. Enter the tax, insurance, maintenance, misc. figure in column H.

27. The net rental income will appear in column I.

28. The appropriate totals will appear in row 83.

29. Remember to press START a couple of times to be sure all the figures are updated.

File name: Painting

Description: Calculation of the amount of each color of paint needed to paint a room, as well as the total cost and cost per color of the paint.

How to use it:

1. Enter the names of the colors of paint you are using in cells A8 to A12. The worksheet is initially set up for as many as five colors per room.

2. Enter the coverage rating for each color in cells C8 to C12.

3. Enter the cost per gallon for each color in cells D8 to D12.

4. In row 21, enter the height, width, and length of the room in columns B, C, and D.

5. The total surface area will appear in cell E21.

6. Enter the color number (1 to 5) you wish to paint the room in cell F21.

7. Enter the number of coats you will apply in cell F21.

8. Repeat steps 3 through 6 for Doors (rows 24 to 28), Windows (rows 30 to 34), and Trim (rows 36 to 40).

9. The analysis by color appears in columns I to M.

10. The totals appear in row 43.

11. The cost by color appears in row 45.

12. The total cost to paint the room appears in cell M47.

File name: Property

Description: Personal property inventory and valuation.

How to use it:

1. Enter the current date in cell B3.
2. Enter your name in cell B4.
3. Enter your address in cell B5.
4. Enter your city and state in cell B6.
5. Enter your zip in cell B7.
6. Enter your telephone number in cell B8.
7. Enter the current year in cell E7.
8. Enter the current inflation rate (between 0 and 1) in cell E8.
9. List each piece of property in rows 16 to 36 with the location in column A, description in column B, serial number in column C, year acquired in column D, cost in column E, and useful life in column F.
10. The years used (current year – year acquired) will appear in column G.
11. The current resale value assuming straight line depreciation appears in column H.

12. The replacement cost (original cost adjusted for inflation) appears in column I.

13. The percent change in cost is shown in column J.

14. The change in cost is shown in cell I42.

15. The percent change in total cost appears in cell I44.

File name: Queue 1

Description: Single server waiting line (queue) model. This worksheet provides a simulation of a single server waiting line and provides performance data.

How to use it:

1. Enter the mean arrival rate (the number of arrivals per unit of time) in cell B4 .

2. Enter the mean service rate (how many customers are served per unit of time) in cell B5.

3. The mean number of customers in the system will appear in cell B9.

4. The mean time each customer spends in the system appears in cell B11.

5. The average length of the line is in cell B13.

6. The average time each customer spends waiting to be served appears in cell B15.

7. The amount of time the server is busy is in cell B17.

File name: Queue 2

Description: Two server waiting line (queue) model. This worksheet provides a simulation of a two server waiting line and provides performance data.

How to use it:

1. Enter the mean arrival rate (the number of arrivals per unit of time) in cell B4 .

2. Enter the mean service rate (how many customers are served per unit of time) in cell B5.

3. The probability that the system is empty will appear in cell B9.

4. The mean number of customers in the line will appear in cell B12.

5. The mean time a customer spends waiting in line is in cell B14.

6. The mean time a customer spends in line and being served will appear in cell B16.

7. The mean number of customers in the system is in cell B18.

8. The server utilization rate will appear in cell B20.

File name: Ratios

Description: Key financial ratio analysis of income statement and balance sheet. Evaluation of the financial health of a company using standard ratios.

How to use it:

1. Enter the gross sales in cell B10.

2. Enter any returns or adjustments to sales in cell B11.

3. The net sales will appear in cell B13.

4. Enter the cost of goods sold in cell B15.

5. The gross profit (net sales - cost of goods sold) will appear in cell B17.

6. Enter the operating expenses in cell B20.

7. Enter the general/administrative expenses in cell B21.

8. Enter the interest expense in cell B22.

9. The total expenses will appear in cell B24.

10. The income before taxes (gross profit - total expenses) will appear in cell B27.

11. The income tax, assuming a 50% tax rate, will appear in cell B29.

12. The after tax income will appear in cell B32.

13. Enter the total cash figure in cell E9.

14. Enter the total accounts receivable in cell E10.

15. Enter the value of inventory in cell E11.

16. Enter the amount of any prepaid expenses in cell E12.

17. The total current assets will appear in cell E14.

18. Enter the amount of investments in cell E16.

19. Enter the value of property, plant, and equipment in cell E17.

20. Enter the amount of accumulated depreciation in cell E18.

21. The total asset value will appear in cell E20.

22. Enter the amount of accounts payable in cell E26.

23. Enter the amount of notes payable in cell E27.

24. Enter the amount of accrued taxes in cell E28.

25. Enter the amount of accrued expenses in cell E29.

26. The current liabilities will appear in cell E31.

27. Enter the amount of long-term debt in cell E33.

28. The total liabilities will appear in cell E35.

29. The total liabilities and owner's equity will appear in cell E43.

30. The key ratios will appear in rows 52 through 66 using the following formulas:

    Return on assets = After tax income / Total assets

    Return on investment = After tax income / Owner's equity

    Net profit margin = After tax income / Net sales

    Current ratio = Current assets / Current liabilities

    Quick ratio = (Current assets - Inventory) / Current liabilities

Debt ratio = Long-term debt / Total assets

Avg. days receivables = (Accounts receivable x 360) / Net sales

Inventory turnover = Net sales / Inventory

File name: Rent Buy

Description: Cost analysis of renting vs. buying a home.

How to use it:

1. Enter the purchase price of the home in cell B4.
2. Enter the down payment percent (between 0 and 1) in cell B5.
3. Enter the amount of the loan in cell B6.
4. Enter the interest rate on the loan (between 0 and 1) in cell B7.
5. Enter the term of the loan in years in cell B8.
6. Enter your marginal tax rate in cell B9.
7. Enter your alternate investment return percent (what you could earn from investing the money if you rent) in cell B10.
8. Enter your monthly rent in cell B33.

9. Intermediate calculations are performed in rows 12 and 13.

10. The figures for purchasing are summarized in cells B25 and C25.

11. The figures for renting are summarized in cells B37 and C37.

12. Compare these summary figures to see which alternative offers the least net cash outflow.

File name: Stocks

Description: Stock portfolio valuation for up to 11 stocks.

How to use it:

1. Enter the company names into cells A8 through A18.

2. Enter the corresponding ticker symbols into cells B8 through B18.

3. Enter the number of shares held for each stock in cells C8 through C18.

4. Enter the purchase price per share for each stock in cells D8 through D18.

5. Enter the current price per share for each stock in cells E8 through E18.

6. The cost for each stock position (number of shares x purchase price) will appear in column F.

7. The current value (number of shares x current price) will appear in column G.

8. The dollar gain or loss for each stock will appear in column H.

9. Enter the dividend per share amount in cells I8 through I18.

10. The total dividend (dividend per share x number of shares) will appear in column J.

11. The dividend yield % (total dividend / cost) will appear in column K.

12. The appropriate totals will appear in row 21.